

Why unlock your link resolver's “black box”?

The answer lies in your strategic plan



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[Agenda]

- What is a black box?
- The SFX Basics Series
 - Course content
 - Common elements
- K-State Libraries' 2007-2012 Strategic Plan
 - Meeting goals & objectives with SFX Basics
- Is SFX Basics strategic?
- Questions & discussion



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[The mysterious black box]

- “...any assembly or subassembly ... that can be inserted in or removed from a system by a user without a detailed knowledge of its internal structure.”
--McGraw-Hill Electronics Dictionary, 6th edition
- “...a device or system or object ... viewed primarily in terms of its input and output characteristics.”
--Wikipedia, http://en.wikipedia.org/wiki/Black_box
- “stuff goes in; magic happens; different stuff comes out”
--J. Brooks-Kieffer



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[Link resolver = black box?]

Users work only with “inputs and outputs”

The screenshot shows a web browser window with the address bar displaying 'http://getit.lib.ksu.edu - Get it @ K-State-SFX: Services for th...'. The page title is 'Get it @ K-State'. Below the title, the source information is displayed: 'Source: Review of urban & regional development studies [0917-0553] cho yr:2003 vol:15 iss:3 pg:208'. The page is divided into several sections: 'Online' with a link to 'Synergy Blackwell' and input fields for Year (2003), Volume (15), Issue (3), and Start Page (208), followed by a 'GO' button; 'Print' with a link to 'K-State Libraries Catalog' and a 'GO' button; 'Save citation' with links to 'RefWorks' and 'EndNote, ProCite, or RefMan', each with a 'GO' button; and 'Need help?' with a link to 'ask a librarian' and a 'GO' button.

http://getit.lib.ksu.edu - Get it @ K-State-SFX: Services for th...

Get it @ K-State

Source: Review of urban & regional development studies [0917-0553] cho yr:2003 vol:15 iss:3 pg:208

Online

Get an online copy from **Synergy Blackwell**

Year: Volume: Issue: Start Page: [GO](#)

Available from 1999 volume: 11 issue:1

Print

Check for a print copy in the **K-State Libraries Catalog** [GO](#)

Save citation

To **RefWorks** [GO](#)

Formatted for **EndNote, ProCite, or RefMan** [GO](#)

Need help?

Then **ask a librarian** [GO](#)

Link resolver = black box?

Staff can administer SFX “without a detailed knowledge of its internal structure”

SFX ADMIN CENTER

SFX instance: `sfxst3`

[KBManager](#) | [KBTools](#) | [Troubleshooting](#) | [Administrator Tools](#) | [Statistics](#) | [Other](#) | [Searchable A-Z](#) | [KBUpdate Reports](#)

Glossary of icons in the Access column: ✓ - Full Access | R - Read Only | X - No Access

KBManager	
Access	Tool Name
✓	Sources
✓	Targets
✓	Search Objects
✓	User Parameters
✓	Institutes

KBTools	
Access	Tool Name
✓	DataLoader
✓	Look-Up Tool
✓	Export Tool
✓	MARCI! Tool
✓	TargetMatcher
✓	Threshold Tool
✓	Category Tool
✓	Collection Tool

Troubleshooting	
Access	Tool Name
✓	OpenURL Generator
✓	Debugging
✓	SFX Help Form
✓	KB changes via CRM

KBUpdate Reports	
Access	Tool Name

K-State Libraries' black box:



- SFX live since August 2006
- Hosted & administered on-site
- Popular with staff and users
- Most staff use public interfaces:
 - Get It menu
 - Get It button
 - A-Z List
 - Citation Linker



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[**Unlock the box**]

Staff can use a link resolver to...

- Improve the user experience
- Work across department lines
- Assess library services and collections

...but only if they understand its tools



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[Teaching GET IT]

SFX Basics series:

- Behind the Get It Button
- The Service Desk's Guide to Get It
- Useful Usage Data
- Collection Development Power Tools

Series goals:

- Reveal how SFX works
- Enable problem-solving
- Improve error reporting
- Advertise added-value features
- Encourage use of advanced tools



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[Selling the series]

- Inclusive
- Short sessions
- Self-contained classes
- Course content on wiki



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Course Content for SFX Basics 1: Behind the Get It Button

Goal:

- Reveal how SFX works

Method:

- Explain OpenURL using familiar terms
- Play a game about SFX transactions
- Think about real-life situations
- Ask lots of questions



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Explain OpenURL in familiar terms

Metadata

Seitz, J.A. (1997). Metaphor, symbolic play, and logical thought in early childhood. *Genetic Social and General Psychology Monographs* 123(4), p. 373-391.

+

Structure

A	B	C	D	E	F	G	H	I	J	K	L
Author	Title	Source	PubDate	PubYear	Volume	Issue	StartPage	EndPage	ISSN	DocType	PubType
Seitz, JA	Metaphor, symbolic play,	GENETIC SOCIAL AND GENERAL P	NOV	1997	123	4	373	391	8756-7547	Article	Journal

+

URL

<http://....>

=



SFX Basics 1: Behind the Get It Button

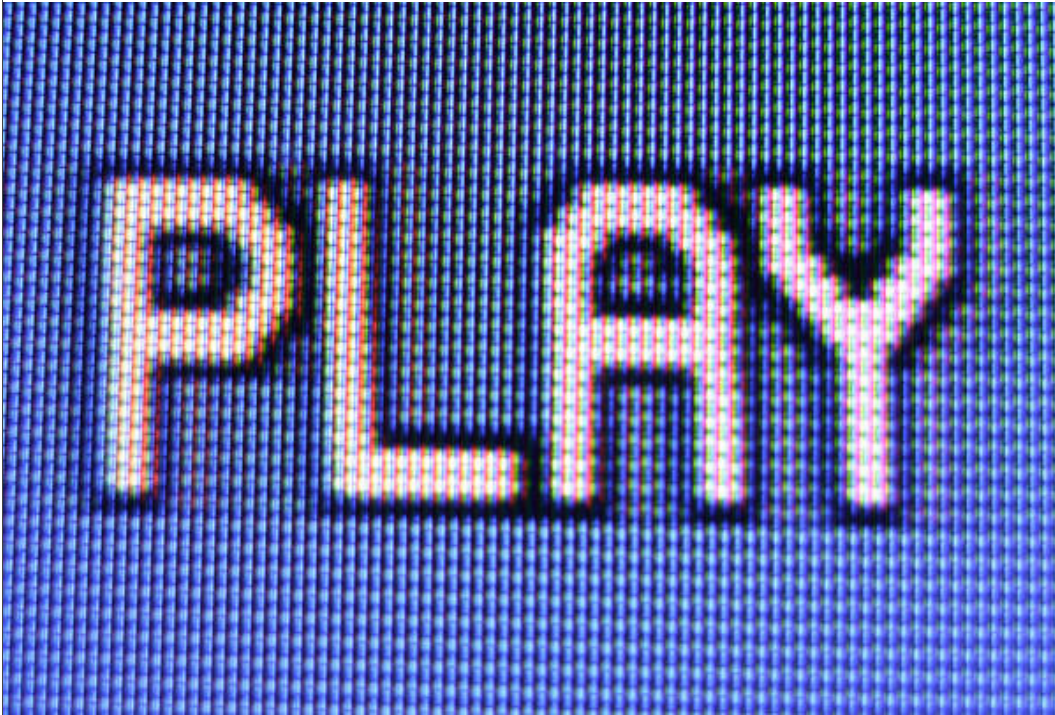
Explain OpenURL in familiar terms

Metadata
Structure
URL

```
http://pulsar.lib.ksu.edu:3210/sfxlcl3?  
url_ver=Z39.88-2004;  
url_ctx_fmt=info:ofi/fmt:kev:mtx:ctx;  
rft_val_fmt=info:ofi/fmt:kev:mtx:journal;  
rft.atitle=Metaphor, symbolic play, and logical thought in early childhood;  
rft.auinit=JA;  
rft.aulast=Seitz;  
rft.date=1997;  
rft.epage=391;  
rft.genre=article;  
rft.issn=8756-7547;  
rft.issue=4;  
rft.spage=373;  
rft.stitle=GENET SOC GEN PSYCH;  
rft.title=GENETIC SOCIAL AND GENERAL PSYCHOLOGY  
MONOGRAPHS;  
rft.volume=123;  
rfr_id=info:sid/www.isinet.com:WoK:WOS
```

SFX Basics 1: Behind the Get It Button

Play a game about SFX transactions



Ask lots of questions

-

SFX Basics 1: Behind the Get It Button

[Course Content for SFX Basics 2: The Service Desk's Guide to Get It]

Goals:

- Enable problem-solving
- Improve error reporting

Method:

- Demonstrate public interfaces
- Simulate common errors
- Think about real-life situations
- Ask lots of questions



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Demonstrate public interfaces

Paths going away:

- Databases

powered by  GET IT

- E-Journals list

- Citation Linker

Destinations:

- Get It button

- Get It menu

- Database

Paths coming home:

- Get It button

- Get It menu

- Catalog

- Illiad

- RefWorks

SFX Basics 2: The Service Desk's Guide to Get It

Simulate common errors

Get It search misses cataloged item:

Get it @ K-State

Title: Moral Relativism and Moral Nihilism
Source: <1>The Oxford Handbook of Ethical Theory<D>, Copp, David (ed)
Dreier
yr:2006 pg:240 -264

Your options

Online
We couldn't find an online copy. Search the catalog for a print copy.

Print
Check for a print copy in the **K-State Libraries Catalog**

Problem:

Information transmitted from Get It to catalog fails to find a resource we own (known issue with CSA Philosopher's Index)

Solution:

Email details of search to Jane Hale

Your search resulted in no hits. Consult the help at the bottom of the screen, check your spelling, and/or ask a librarian for assistance.

Simple Search | **Guided Keyword** | **Course Reserve** | **New Resources**

Search for: <1>The Oxford Handbook of Ethical Theory<D>, Copp,
Search by: Title (omit leading articles: A, An, The, L', Der, Los, etc.)
. Journal/Newspaper/Magazine Title (omit leading articles)

Timeframe:

24 - 48 hours to investigate; longer to solve database or Get It programming problem

Workaround:

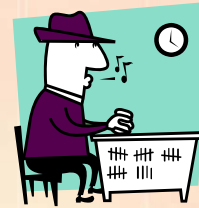
Check search for weird characters, extra info, or wrong metadata
Modify data and re-run search

SFX Basics 2: The Service Desk's Guide to Get It

Think about real-life situations

Ask lots of questions

- Describe the error (and how you found it) in extensive detail
- Use IM or the telephone for emergencies
- Use email when you can wait for a reply
- Is a patron waiting for a solution? Tell us!
- Be patient – Get It doesn't change instantly:
 - Production processes changes in 24 hours, 7 days per week
 - E-Journals list processes changes in 24 hours, 5 days per week



SFX Basics 2: The Service Desk's Guide to Get It

Course Content for SFX Basics 3: Useful Usage Data

Goals:

- Advertise added-value features
- Encourage use of advanced tools

Method:

- Define terms & abilities of SFX usage data
- Show SFX data from K-State Libraries
- Think about real-life situations
- Ask lots of questions



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Define terms & abilities of SFX usage data

- **The transaction:**

- Request: a click of the Get It button
Invokes the Get It menu from any source
- Clickthrough: a click of GO inside the Get It menu
Opens the user's choice of target
- Menu screen: the Get It menu
Also called the SFX menu

- **The requested action:**

- Service: what the user asks Get It to do
Ex: getFullText, getHolding, getDocumentDelivery

SFX Basics 3: Useful Usage Data

Define terms & abilities of SFX usage data

Within scope:

- Count choices made around Get It button and menu
- Enhance and supplement other sources of usage data

Outside scope:

- Count choices made before clicking Get It or after moving to a target

SFX Basics 3: Useful Usage Data

Show SFX data from K-State Libraries

Six queries are processed monthly:

- 1) Number of requests and clickthroughs per day
- 2) Number of requests and clickthroughs per source
- 5) Number of SFX requests with/without full-text services
- 7) Number of clickthroughs per target
- 10) Most popular serials selected by target
- 19) Most popular journals

(in bold on your handout)

Questions about these queries?

SFX Basics 3: Useful Usage Data

Think about real-life situations

How many of our users visit a source database and then do something besides click Get It?

SFX Query 2 - requests & clickthroughs per source

+

Source database vendor data

How much money do we spend on unused full-text journal access?

SFX Query 16 - unused full-text journals

+

Acquisitions/purchasing data

How many users give up their search for an item at the Illiad form? Does this happen from one source more than another?

SFX Query 13 – number of document delivery clickthroughs per source

+

Illiad data

SFX Basics 3: Useful Usage Data

Ask lots of questions

- Which queries look promising?
- What creative possibilities do you see in this data?
- Which queries should be added to or deleted from the monthly process? Why?
- What forms of delivery do you find useful?
- Other questions?

SFX Basics 3: Useful Usage Data

Course Content for SFX Basics 4: Collection Development Power Tools

Goals:

- Advertise added-value features
- Encourage use of advanced tools

Method:

- Define terms & abilities of SFX KBTools
- Generate sample reports
- Think about real-life situations
- Ask lots of questions



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Define terms & abilities of SFX KBTools

- **DataLoader:**
Manage and update object portfolios
- **Look-up Tool:**
Match journal titles to ISSN, ISBN, or LCCN
- **Export Tool:**
Export information from the KB in various formats
- **TargetMatcher:**
Batch finding and activating targets and object portfolios
- **Threshold Tool:**
Manage local thresholds in the KB
- **Category Tool:**
Set up, copy, and view Ex Libris categories
- **Collection Tool:**
Compare targets and active object portfolios



Generate sample reports
Think about real-life situations

Collection Tool

Compare targets and active object portfolios



Solves these problems:

- We're looking at CINAHL Plus with Full Text. How does this database compare with the CINAHL we already have?
- What full-text journals do we pay for in more than one database?

Ask lots of questions

- Targeted purchasing decisions begin with strategic thinking by subject librarians
- Resource activation and user accessibility begin with details mastered by Serials, Acquisitions, and DID
- Collection Tools offer assistance with both activities when resources touch SFX
- What potential do you see for efficient, strategic collection development?

SFX Basics 4: Collection Development Power Tools

[Complete course contents]

- Included on your flash drive:
 - SFX Basics 1: Behind the Get It Button
 - [Course slides](#)
 - [Game materials & instructions](#)
 - [Feedback form](#)
 - SFX Basics 2: The Service Desk's Guide to Get It
 - [Course slides](#)
 - [Feedback form](#)
 - SFX Basics 3: Useful Usage Data
 - [Course slides](#)
 - [SFX Queries handout](#)
 - [Feedback form](#)
 - SFX Basics 4: Collection Development Power Tools
 - [Course slides](#)
 - [SFX KBTools handout & demo reports](#)
 - [Feedback form](#)
 - K-State Libraries Strategic Plan
- http://docs.ksulib.org/index.php?title=SFX_mini_tutorial_series



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[Common Elements: SFX Basics Series]

- Ordinary definitions of SFX jargon
- A live demonstration or participatory activity
- Real-world problems & scenarios applied to SFX processes & tools
- Discussions relevant to staff responsibilities
- Time for questions about SFX services
- Feedback solicited & encouraged



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[K-State Libraries' 2007-2012 Strategic Plan]

All about organizational change:

“...[W]e must foster a flexible, adaptable, and creative environment to meet...changing needs.”

SFX Basics supports goals & objectives for:

- collections
- access
- staffing



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[Goal: Collections]

“Our users will find collections tailored and managed to meet their changing needs and advance the priorities of the University.”



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[Goal: Collections Objective 1.1]

“We will develop dexterous methodologies to better understand the usage of our collections and the current and future needs of users in order to make informed decisions in collections development and management.”

- ✓ SFX Basics 3:
Useful Usage Data



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[Goal: Collections Objective 1.2]

“We will articulate and implement a comprehensive development and management policy for collections, providing a framework for targeting future acquisitions on user needs and institutional strengths while reducing acquisitions in other areas.”

- ✓ SFX Basics 4:
Collection Development Power Tools



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[Goal: Access]

“Our users will have seamless, user-driven access to reliable information, scholarship, and services when and where needed and have opportunities to learn how to effectively use and apply these resources.”



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[Goal: Access Objective 2.1]

“We will enable users to interact with our services through emerging or user-familiar technologies.”

- ✓ SFX Basics 1:
Behind the Get It Button
- ✓ SFX Basics 2:
The Service Desk's Guide to Get It



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[Goal: Access Objective 2.2]

“We will simplify access to our services and our collections.”

- ✓ SFX Basics 1:
Behind the Get It Button
- ✓ SFX Basics 2:
The Service Desk’s Guide to Get It



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[Goal: Staffing]

“Our internal capacity will expand so we can deliver 21st-century library and information services aligned with the University’s missions and academic priorities.”



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[Goal: Staffing Objective 5.1]

“We will foster an organizational culture based on mutual respect, understanding, and commitment to the work of the Libraries by facilitating effective internal communication and openness in decision making.”

✓ SFX Basics series



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[Goal: Staffing Objective 5.2]

“We will develop mechanisms to better understand the needs of our users, assess our effectiveness in meeting those needs, and incorporate those needs into our services and collections.”

✓ SFX Basics series



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[Goal: Staffing Objective 5.5]

“We will provide continuous learning opportunities for all staff to ensure that every staff member has the opportunity to keep up with developments in their field and develop practical skills needed by the Libraries.”

- ✓ SFX Basics series



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[Change and the strategic plan]

Strategy



“the art of devising or employing plans...toward a goal”

K-State Libraries’ goal



“flexible, adaptable, and creative”

To meet this goal?



Change the organization

To change the organization?



Change individual’s behavior



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Definition - --Merriam-Webster Online Dictionary

[*Now is SFX Basics strategic?*]

No:

- The series made few lasting changes to staff behaviors.
- The tools presented in the series have not been systematically included in workflows.
- Staff members choose which, if any, tools to use.



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[*Could SFX Basics be strategic?*]

Yes:

- When multiple messengers speak to all levels of the organization
- When administrators explicitly encourage, support, and reinforce
- When the organization holds itself accountable for learning and doing



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[Conclusions]

- Is the series worth repeating?
 - Yes, with changes
- Were the series goals met?
 - In part:
 - 👍 Exposed staff to previously unknown tools
 - 👎 Changed few behaviors
- Best long-term outcome so far?
 - Many staff remember who to ask about problems related to SFX



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[Questions & Discussion]


Thanks for attending!

Contact me:

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